

**New Hire Action**Transaction Code:  
(PA40)


- Purpose** Use this procedure to hire a new employee into HRMS.
- Trigger** Perform this procedure when a new employee to state service is being entered into HRMS for the first time.
- Prerequisites** An employee must have been hired into State service and completed a New Hire Information Packet.
- End User Roles** In order to perform this transaction you must be assigned the following role: Personnel Administration Processor, Payroll Processor, and Benefits Processor

Change History	
Date	Change Description
12/3/2012	Procedure updated to match current system. Updated Helpful hints to include searching for employee's Social Security Number. Added step to create employees' email address.
02/21/2013	Removed note about <i>Personnel Data (0002)</i> start date changing to the employees birthday. Start date will remain day of hire.
03/13/2013	Added <i>Create Communication (0150)</i> to create an employee's email address into the dynamic action of hiring a new employee.










**Menu Path** Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

**Transaction Code** PA40

<b>Helpful Hints</b>	<ul style="list-style-type: none"> <li>Before processing a <b>New Hire</b> action, check the <b>Business Intelligence and/or Data Warehouse</b> for previous Personnel Numbers.</li> <li>Verify that the new employee's Social Security Number does not already exist within HRMS.             <ul style="list-style-type: none"> <li>To complete this, enter <b>PA20</b> into the command field.</li> <li>Once on the <b>Display HR Master Data Screen</b> key =c.. followed by the employees Social Security Number (without the dashes) and press enter. Example: =c..500000076</li> </ul> </li> <li>Personal Holiday quotas are only created by the system at the beginning of a year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See the OLQR procedure <a href="#">Quota Generate Accruals Manually</a>.</li> <li>This procedure may require hand-offs to other roles (payroll processor and/or benefits processor) depending on the structure of your agency and your role at</li> </ul>
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	<p>your agency.</p> <ul style="list-style-type: none"> <li>It is critical if a hand-off is made to another role, that the transaction code <b>PA40</b> is used and the  Execute info group process is used. This is explained further in this process. Using <b>PA40</b> will ensure that all required infotypes are completed.</li> <li>Do <b>not</b> use the Transaction code <b>PA30</b> to complete portions of the the appointment change action.</li> </ul>
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
<b>Error</b> 	<p><b>Example:</b>  Make an entry in all required fields.</p> <p><b>Action:</b> Fix the problem(s) and then click  (Enter) to validate and proceed.</p>
<b>Warning</b> 	<p><b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.</p> <p><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.</p>
<b>Confirmation</b>  or 	<p><b>Example:</b>  Save your entries.</p> <p><b>Action:</b> Perform the required action to proceed.</p>

## Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.

HR Master Data   Edit   Goto   Extras   Utilities   Settings   System   Help

## Personnel Actions

Personnel no.


From

Personnel Actions			
Action Type	Personn...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

2. Perform the following fields:


If	Go To
You are the <b><i>Personnel Administration Processor</i></b>	<a href="#">Step 3</a>
You are the <b><i>Payroll Processor</i></b>	<a href="#">Step 55</a>
You are the <b><i>Benefits Processor</i></b>	<a href="#">Step 76</a>

3. Perform one of the following:


R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
From	R	<p>The effective date of the new hire appointment.</p> <p> Only enter the <b>From Date</b> if you are the <b>Personnel Processor</b> initiating the new hire action.</p> <p><b>Example:</b> 6/1/2012</p>

4. Click the box to the left of  to select.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help



**Personnel Actions**




Personnel no.

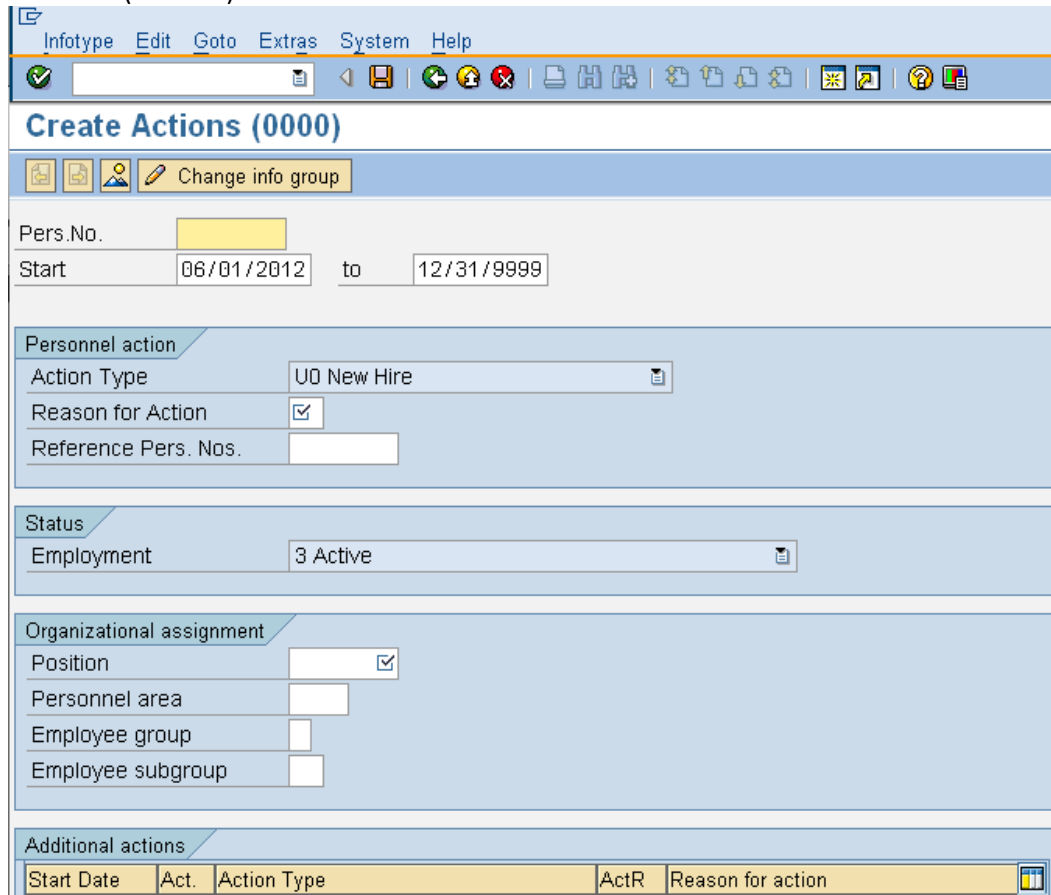
From

**Personnel Actions**

Action Type	Personnel...	EE group	EE subgr...
<b>New Hire</b>			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

5. Click  (Enter) to validate the information.

6. Click  (Execute) to execute the action.



**Create Actions (0000)**

Pers.No.

Start  to

**Personnel action**

Action Type

Reason for Action ☒

Reference Pers. Nos.

**Status**

Employment

**Organizational assignment**

Position ☒

Personnel area



Employee group

Employee subgroup


**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action

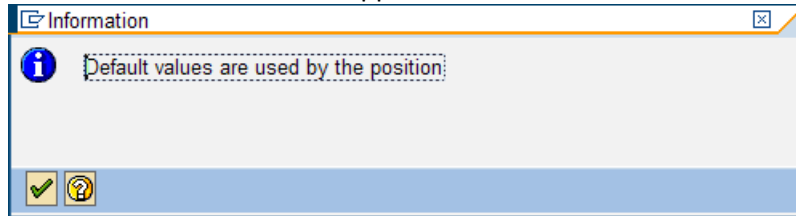
7. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	<p>It stores the reason that an action has been performed. For guidance of reason codes, refer to the HRMS Data Definitions page:  <a href="http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx">http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/HRMSDataDefinitions.aspx</a></p> <p> Click the  (Matchcode) to open the selection list.</p> <p><b>Example:</b> 02 Probationary</p>
Position	R	This is a specific and concrete description of the responsibilities that one individual fulfills in an organization.

		Example: 71004928
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8. Click  (Enter) to validate the information.

9. An Information window will appear.






























10. Click  (Continue) to continue.

Infotype Edit Goto Extras System Help

### Create Actions (0000)

Pers.No.

Start  to

**Personnel action**

Action Type

Reason for Action  Probationary

Reference Pers. Nos.

**Status**

Employment

**Organizational assignment**

Position  OFF ASST 3

Personnel area  DSHS Region 1

Employee group  Permanent

Employee subgroup  M-OT Elig>40hrs/wk

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action



The employee's personnel number will now be generated.

11. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Personal Data (0002)**

Personnel No. 40000639

Status Active

Start 06/01/2012 To 12/31/9999

**Name**

Title

Last name

First name

Middle name

Nickname

Suffix

Name

**HR data**

SSN

Date of Birth

Marital Status

**Gender**

Female Male

Since

12. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Last Name	R	The legal last name of an employee as indicated on their social security card.  <b>Example:</b> Smith
First Name	O	The legal first name of an employee as indicated on their social security card.  <b>Example:</b> Joseph
SSN	R	The 9 digit number assigned by the Social Security Administration.  <b>Example:</b> 432-56-7878



Date of Birth	R	The date of the employee's birth. <b>Example:</b> 05/03/1978
Gender	R	Enter the gender of the employee. <b>Example:</b> Male
Marital Status	R	The marital status of the employee. <b>Example:</b> Married

Infotype Edit Goto Extras System Help

Create Personal Data (0002)

Personnel No. 40000639

Status Active

Start 05/03/1978 To 12/31/9999

Name

Title

Last name SMITH

First name JOSEPH

Middle name

Nickname

Suffix

Name SMITH JOSEPH

HR data

SSN 432-56-7878


Date of Birth 05/03/1978

Gender

☐ Female ☒ Male

Marital Status Marr.

Since

13. Click  (Enter) to validate the information.

14. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Organizational Assignment (0001)**

Org Structure

Personnel No. 40000639

Status Active

Start 06/01/2012 to 12/31/9999

**Enterprise structure**

CoCode WA01 STATE OF WASHINGTON

Pers.area 3021 DSHS Region 1 Subarea 0001 Non Represented

Cost Ctr 3000000000 DEFAULT AGENC... Bus. Area 3000 Dept of Social & Health S...

Fund

**Personnel structure**

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 06 M-OT Elig>40hrs/wk Contract Permanent

**Organizational plan**

Percentage 100.00 Assignment

Position 71004928 VW34 OFF ASST 3

Job key 00000000

Exempt

Org. Unit 30012250 EXEC HRD EXEC Human Resour...

Org.key




**Administrator**


PersAdmin


Time

PayrAdmin






















15. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract	R	<p>The status of the appointment.</p> <p> Click  (Dopdown) to view the selection list.</p> <p><b>Example:</b> Probationary.</p>
Org. Key	O	<p>The pay distribution location.</p> <p> This field is used at the discretion of the agency.</p>




		<b>Example: 1RAMAD</b>
Time	O	<p>The time data administrator is responsible for the employees assigned to him or her.</p> <p> This field is used at the discretion of the agency.</p> <p><b>Example: DA</b></p>

16. Click  (Enter) to validate the information.

Infotype Edit Goto Extras System Help

### Create Organizational Assignment (0001)

   **Org Structure**


Personnel No.  Status

Start  to


**Enterprise structure**

CoCode	WA01	STATE OF WASHINGTON	Subarea	0001	Non Represented
Pers.area	3021	DSHS Region 1	Bus. Area	3000	Dept of Social & Health S...
Cost Ctr	3000000000	DEFAULT AGENC...	Fund		

**Personnel structure**

EE group	0	Permanent	Payr.area	11	Semi-monthly
EE subgroup	06	M-OT Elig>40hrs/wk	Contract	02 Probationary	

**Organizational plan**

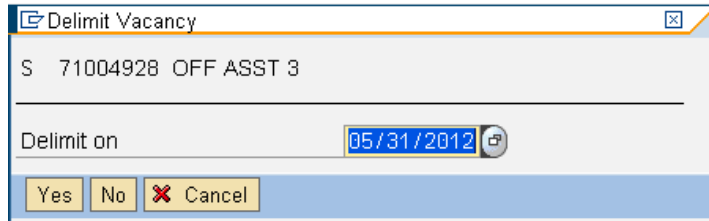
Percentage	100.00	 Assignment
Position	71004928	VW34 OFF ASST 3
Job key	00000000	
Exempt	<input type="checkbox"/>	
Org. Unit	30012250	EXEC HRD EXEC Human Resour...
Org.key		

**Administrator**

PersAdmin	<input type="text"/>
Time	<input type="text"/>
PayrAdmin	<input type="text"/>

17. Click  (Save) to save.

18. If the Delimit Vacancy appears, select the appropriate option for your agency's position.



Delimit Vacancy

S 71004928 OFF ASST 3


Delimit on 05/31/2012

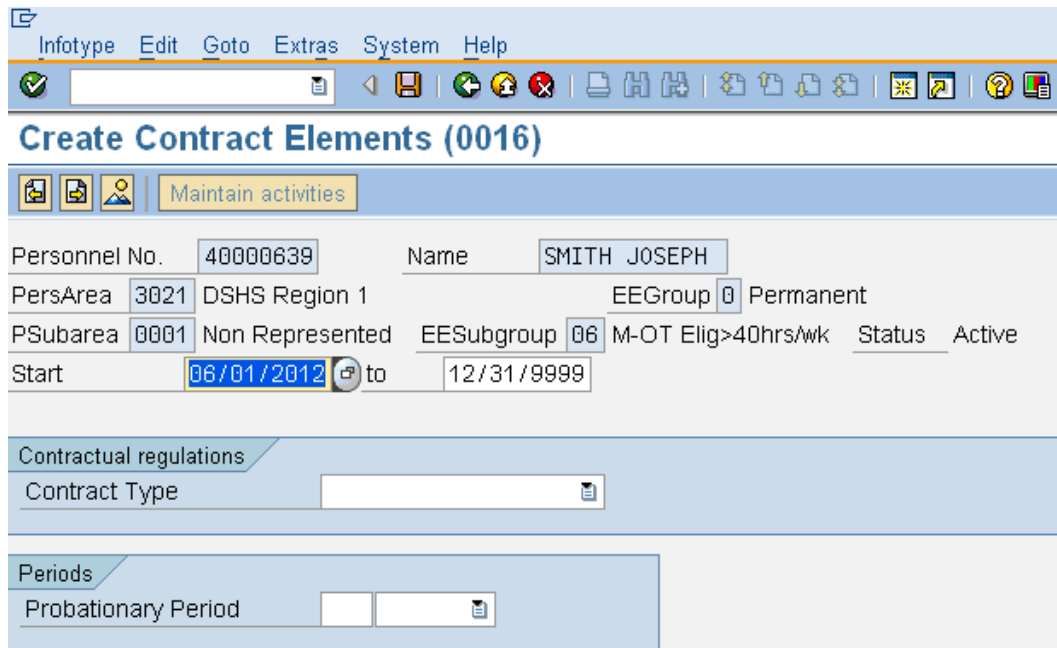
Yes No Cancel



This screen will only appear if there is a vacancy that will be delimited by the new hire.

19.

Click  to delimit the Vacancy.



Infotype Edit Goto Extras System Help

**Create Contract Elements (0016)**

Maintain activities

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Contractual regulations

Contract Type

Periods

Probationary Period

20. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract Type	R	The status of employment within the State. <b>Example:</b> Non-Permanent
Probationary Period	O	The length of the employee's probationary period. <b>Example:</b> 6 Months

Infotype Edit Goto Extras System Help

**Create Contract Elements (0016)**

Maintain activities

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 06/01/2012 to 12/31/9999

Contractual regulations

Contract Type 01 Non-Permanent

Periods

Probationary Period 6 Months

21. Click  (Enter) to validate the information.

22. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Monitoring of Tasks (0019)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Task

Task Type 01 Prob per to expire


Date of Task 12/01/2012 Processing indicator New task

Reminder

Reminder Date



Lead/follow-up time For specific task type

23. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reminder Date	O	This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated.  <b>Example:</b> 11/21/2012
Lead/follow-up time	O	This is the amount of time to be notified in advance or after an event has occurred.   When the infotype is validated, this field will be converted into the <i>Reminder Date</i> field based on the <i>Date of Task</i> . <b>Example:</b> 1 Weeks



You can run the **Task Monitoring Report (S\_PH0\_48000450)** to get the reminder dates and tasks.

24. Click  (Enter) to validate the information.
25. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Addresses (0006)**

Foreign address

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Address**

Address type 1 Permanent residenc...

Street and House No. ☒

2nd Address Line

Postal Code/City ☒ ☒

Country Key US USA

Office/region ☒

County code ☒

Telephone Number

**Communication**


Communication 1




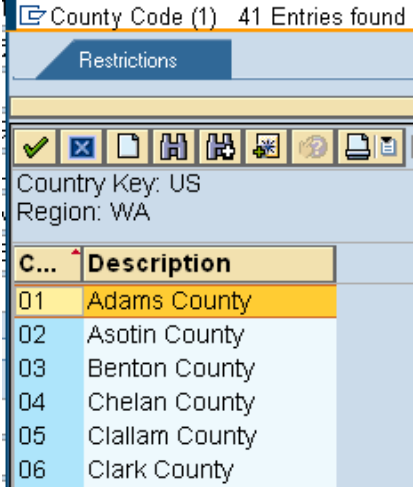
Communication 2

Communication 3

Communication 4

26. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Address Type	R	<p>The type of address for this infotype.</p> <p> You can also select mailing address from the drop down list. If the employee provides a permanent residence and mailing address you can only complete one type during the New Hire Action. To enter another address type follow the procedure <a href="#">Addresses Create and Maintain</a> that is located in the OLQR.</p>

		<b>Example:</b> Permanent Residence.
Street/House NO.	R	The residential street address of an employee.  <b>Example:</b> 540 Dundee PL
Postal Code/City	R	The 5 or 9 digit zip code and city the employee resides in.  <b>Example:</b> 98501/Olympia
Country Key	R	The country the employee resides in.  This field will default to USA.  <b>Example:</b> USA
Office/region	R	The state in which the employee resides.  <b>Example:</b> WA
County Code	R	The numeric code for the county in which the employee resides.  Click the  (Matchcode) to display options.  <b>Example:</b> 34 – Thurston County
Telephone Number	O	The telephone number for an employee.  <b>Example:</b> Home- 360.664.6400



Infotype Edit Goto Extras System Help

**Create Addresses (0006)**

Foreign address

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Address**

Address type 1 Permanent residenc...

Street and House No. 540 Dundee PL

2nd Address Line

Postal Code/City 98501 Oly

Country Key US USA


Office/region WA Washington

County code 34 Thurston County

Telephone Number 360 . 664 . 6400

**Communication**

Communication 1

27. Click  (Enter) to validate the information.

28. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Create Communication (0105)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 06/01/2012 to 12/31/9999

Communication



Type 0010 E-mail

ID/number ☒




29. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
ID/Number	R	<p>Enter the employee's work email</p> <p> <b>If you do not know the email address</b> at the time of the new hire, click the next record button to move to the next infotype.</p> <p>Enter the email address using Maintain HR Master Data PA30 as soon as you obtain it.</p> <p><b>Example:</b> JHS@DSHS.WA.GOV</p>

Infotype Edit Goto Extras System Help


### Create Communication (0105)

Personnel No. 40000639 Name SMITH JOSEPH  
PersArea 3021 DSHS Region 1 EEGGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
Start 06/01/2012 to 12/31/9999

Communication

Type 0010 E-mail  
ID/number JOSEPH.SMITH@DSHSREG.WA.GOV

30. Click  (Enter) to validate the information.

31. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Planned Working Time (0007)**

Work schedule

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 To 12/31/9999

**Work schedule rule**

Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

☐ Part-time employee Additional time ID

**Working time**

Employment percent 100.00

Daily working hours

Weekly working hours 0.00

Monthly working hrs 0.00

Annual working hours 0.00

Weekly workdays

☐ Dyn. daily work schedule

Min. Max.

Min. Max.

Min. Max.

Min. Max.

32. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday.  <b>Example:</b> FULL
Time Mgmt status	R	This is part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. 1-Time Evaluation of actual times - Use for Hourly employees 9-Time Evaluation of planned times - Use for Monthly employees  <b>Example:</b> 9- Time evaluation of planned times
Additional time ID	R	The indicator on how employee leave will accrue Enter:

		<ul style="list-style-type: none"> <li>00 for full normal leave accrual (will default if to normal if field is left blank).</li> <li>01 for NO leave accrual</li> <li>02 for sick leave accrual only</li> </ul>
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Employment percent	R	<p>The amount of time that an employee works per week in a particular position and is described in terms of a percentage.</p> <p><b>Example:</b> 100.00</p>
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Infotype Edit Goto Extras System Help

Create Planned Working Time (0007)

Work schedule

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 To 12/31/9999

Work schedule rule


Work schedule rule FULL 5-8s: M-F 8 hpd

Time Mgmt status 9 9 - Time evaluation of planned times

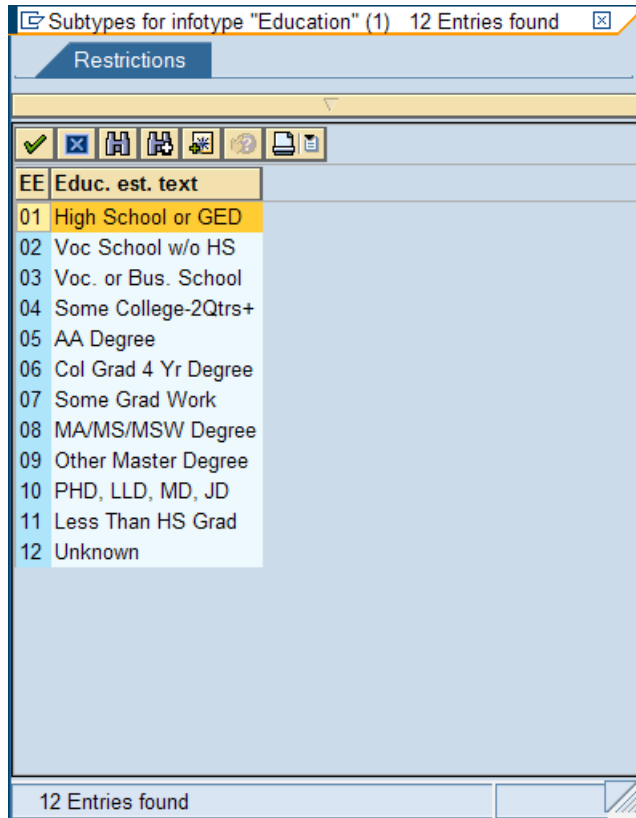
☐ Part-time employee Additional time ID

Working time

Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule
Daily working hours	8.00	Min. Max.
Weekly working hours	40.00	Min. Max.
Monthly working hrs	174.00	Min. Max.
Annual working hours	2080.00	Min. Max.
Weekly workdays	5.00	

33. Click  (Enter) to validate the information.

34. Click  (Save) to save.



35. Click on the appropriate education level.



This infotype can be skipped by clicking  (Close) to close the window.

- 36.



Click  (Copy) to accept.

Infotype Edit Goto Extras System Help

**Create Education (0022)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 09/16/1996 to 06/01/2000

Educational est. 06 Col Grad 4 Yr Degree

Education/training 5 Business Administration


Institute/location Central Washington University

Country Key US USA

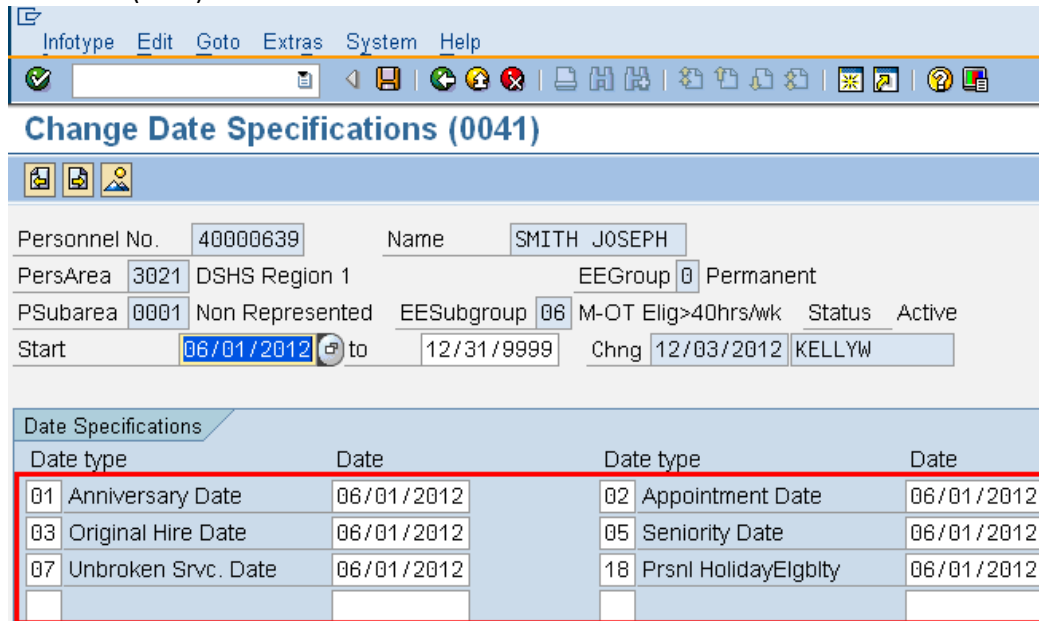
Certificate 25 Not Applicable

37. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. <b>Example:</b> 09/16/1996
To	R	It specifies the end date of a record, transaction, or search. <b>Example:</b> 6/1/2000
Education / training	R	This is the type of education and/or training the employee/applicant has acquired at a given educational institution. <b>Example:</b> 5- Business Administration
Institute / location	R	This is the name of educational institution attended. <b>Example:</b> Central Washington University
Certificate	R	This is the type of leaving certificate (e.g. high school diploma, University degree) the employee or applicant has acquired at a given Institution. <b>Example:</b> 25 Not Applicable

38. Click  (Enter) to validate the information.

39. Click  (Save) to save.






The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility-Date type 18) is the date an employee is eligible to take a personal holiday.

The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.

In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

40. If you would like to indicate the date the employee will be eligible to take vacation leave (annual leave), complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Date type	O	<p>Defines the meaning of a particular date.</p> <p> Place cursor in the first available date type field and click on the  (Matchcode) to display all date types.</p>



		Date type (1) 35 Entries found <div>Restrictions</div> <div> </div> <div> <b>DT</b> <b>Date type</b>  01 Anniversary Date  02 Appointment Date  03 Original Hire Date  04 Prior PID  05 Seniority Date  06 Separation Eff. Date </div>
		<b>Example:</b> 09 (Vac Lv Frozen Up To)
Date	R	This is either the current date or a date that must be entered into the system to store a record. <b>Example:</b> 01/01/2020

Infotype Edit Goto Extras System Help

### Change Date Specifications (0041)

Personnel No. 40000639 Name SMITH JOSEPH  
PersArea 3021 DSHS Region 1 EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
Start 06/01/2012 to 12/31/9999 Chng 12/04/2012 KELLYW

Date Specifications	
Date type	Date
01 Anniversary Date	06/01/2012
03 Original Hire Date	06/01/2012
07 Unbroken Svc. Date	06/01/2012
18 Prsnl HolidayElgblty	06/01/2012
Date type	Date
02 Appointment Date	06/01/2012
05 Seniority Date	06/01/2012
09 Vac Lv Frozen UpTo	12/01/2012

41. Click (Enter) to validate the information.
42. Click (Save) to save.

Infotype Edit Goto Extras System Help

**Create Additional Personal Data (0077)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/Awk Status Active

Start 06/01/2012 To 12/31/9999

**Additional Personal Data**

Ethnic origin

Ethnicity(New)

**Race Data**

☒ Race Category

☐ American Indian/Alaskan Native

☐ Asian

☐ Black or African American

☐ Native Hawaiian or Other Pac Islander

☐ White

Military status

☐ Exempt from EEO

**Veteran Status**

Discharge Date

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other Protected Veteran

☐ Recently separated veteran

☐ Armed Forces Service Medal Veteran

☐ Disabled Veteran

☐ Non-veteran

**Disability**


☐ Disability

Disability Date

Date Learned

43.

Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Ethnic origin	O	The employee's ethnic group.  <b>Example:</b> Black/Not Hispanic origin
Ethnicity (New)	O	The EEO coded field allows you to group employees by ethnic origin.  <b>Example:</b> Not Hispanic/Latino
Military Status	O	The branch of service the employee served/serves in.   If the employee has <b>not</b> served in the military you can select <b>Non/Unspec Vet's Status</b> or leave the field <b>blank</b> .  <b>Example:</b> Rtrd VtnmVT> 500


44. In the **Race Data** Group, click the checkbox to the left of the appropriate **Race** Category to select.

42. If applicable, choose a **Veteran Status**.



Non-Veteran is the default **Veteran Status**, if you select another **Veteran Status**, then you must **uncheck** the Non-Veteran Status.

43. If applicable, choose a **Disability**.

44. Click  (Enter) to validate the information.

Infotype Edit Goto Extras System Help

Change Additional Personal Data (0077)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 To 12/31/9999 Chg. 12/04/2012 KELLYW

Additional Personal Data

Ethnic origin02 Black/Not Hispanic origin

Ethnicity(New)E2 Not Hispanic/Latino

Race Data

☒ Race Category

☐ American Indian/Alaskan Native

☐ Asian

☒ Black or African American

☐ Native Hawaiian or Other Pac Islander

☐ White

Military status14 1 yr + w/honor disc <\$500 1 yr + w/honor disc <\$

☐ Exempt from EEO

Veteran Status

Discharge Date04/01/2012

☐ Special disabled veteran

☐ Vietnam-era veteran

☐ Other Protected Veteran

☒ Recently separated veteran

☐ Armed Forces Service Medal Veteran

☐ Disabled Veteran

☐ Non-veteran

Disability

☐ Disability

Disability Date

Date Learned

45.

Click  (Save) to save.

### Create Military Service (0081)

Personnel No. 
 Name


PersArea  DSHS Region 1
  EEGroup  Permanent

PSubarea  Non Represented
  EESubgroup  M-OT Elig>40hrs/wk
 Status



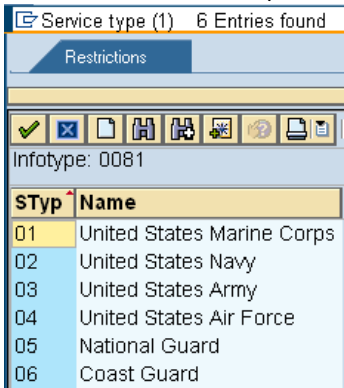
Start  To

Military/non-military service

Service type

46.  This infotype will only appear if a Military Status was chosen on the *Additional Personal Data Infotype*.

Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Service Type	R	<p>This defines what type of service.</p> <p> Click on the  (Matchcode) to display all service types.</p>  <p><b>Example:</b> 01- United States Marine Corps</p>



Infotype Edit Goto Extras System Help

## Create Military Service (0081)

Personnel No.	40000639	Name	SMITH JOSEPH
PersArea	3021 DSHS Region 1	EGroup	0 Permanent
PSubarea	0001 Non Represented	EESubgroup	06 M-OT Elig>40hrs/wk Status Active
Start	06/01/2012 To		12/31/9999

Military/non-military service

Service type	01 United States Marine Corps
--------------	-------------------------------

47. Click  (Enter) to validate the information.
48. Click  (Save) to save.

**Create Time Specification/Employ. Period (0552)**

Personnel No.  Name

PersArea  DSHS Region 1 EEGroup  Permanent

PSubarea  Non Represented EESubgroup  M-OT Elig>40hrs/wk Status

Start  To ☒



**Time specifications/employment period**


Time spec.  Military service / non-military service

☐ Do not evaluate

















Duration of validity period		Imputable period	
Years	<input type="text" value="0"/>	Years	<input type="text" value=""/>
Months	<input type="text" value="0"/>	Months	<input type="text" value=""/>
Days	<input type="text" value="0"/>	Days	<input type="text" value=""/>

49. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Start	R	 The start date of the employee's Military Service This should match what is on the employee's DD214 paperwork. <b>Example:</b> 1/7/2000
To	R	 The end date of the employee's Military Service This should match what is on the employee's DD214 paperwork. <b>Example:</b> 8/29/2006

50. Click  (Enter) to validate the information.

Infotype Edit Goto Extras System Help

### Create Time Specification/Employ. Period (0552)

Personnel No. 40000639 Name SMITH JOSEPH  
 PersArea 3021 DSHS Region 1 EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 01/07/2000 To 08/29/2006

Time specifications/employment period

Time spec. DE08 Military service / non-military service



☐ Do not evaluate

Duration of validity period

Years	6
Months	7
Days	23

Imputable period

Years	
Months	
Days	

 The fields under **Duration of validity period** will automatically calculate based upon dates entered in the **Start and To** fields when you press  (Enter).

51. Click  (Save) to save.

Infotype Edit Goto Wage types Extras System Help

**Create Basic Pay (0008)**

Salary amount Payments and deductions

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Subtype 0 Basic contract

Pay scale

Reason ☒ Cap.util.M 100.00

PS type 00 Non-Represented WkHrs/period 87.00 Semi-monthly



PS Area 01 Standard Progression Next inc.

PS group 31 Level A Ann.salary 25,932.00 USD

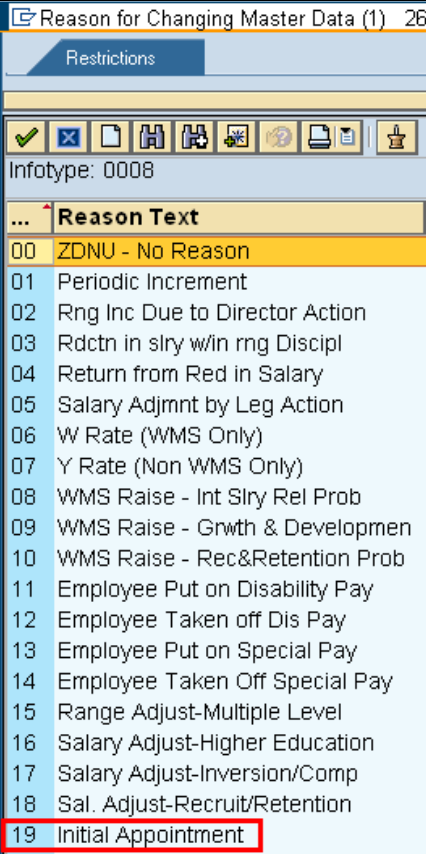

Wa...	Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1003	Pay Period Salary		1,080.50	USD	I	<input checked="" type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		
				USD		<input type="checkbox"/>		

IV 12/05/2012 - 12/31/9999 1,080.50 USD

52. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason	R	<p>This is a specific reason for performing an action or maintaining an infotype.</p> <p> Click on the  (matchcode) to display all entries.</p>



		 <p><b>Example:</b> 19- Initial Appointment</p>
Next Increase	<b>O</b>	<p>The date of the employee's next pay increase.</p> <p> If you leave this field blank, the employee <b>will not</b> receive a pay increase.</p> <p><b>Example:</b> 12/1/2012</p>

Infotype Edit Goto Wage types Extras System Help

**Create Basic Pay (0008)**

Salary amount Payments and deductions

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Subtype 0 Basic contract

**Pay scale**

Reason 19 Initial Appointment Cap.util.M 100.00


PS type 00 Non-Represented WkHrs/period 87.00 Semi-monthly


PS Area 01 Standard Progression Next inc. 12/01/2012

PS group 31 Level A Ann.salary 25,932.00 USD


Wage Type Long Text	O...	Amount	Curre...	In...	A...	Number/Unit	Unit
1003 Pay Period Salary		1,080.50	USD	I	<input checked="" type="checkbox"/>		
			USD		<input type="checkbox"/>		
			USD		<input type="checkbox"/>		
			USD		<input type="checkbox"/>		
			USD		<input type="checkbox"/>		
			USD		<input type="checkbox"/>		
			USD		<input type="checkbox"/>		

IV 12/05/2012 - 12/31/9999 1,080.50 USD


53. Click  (Enter) to validate information.

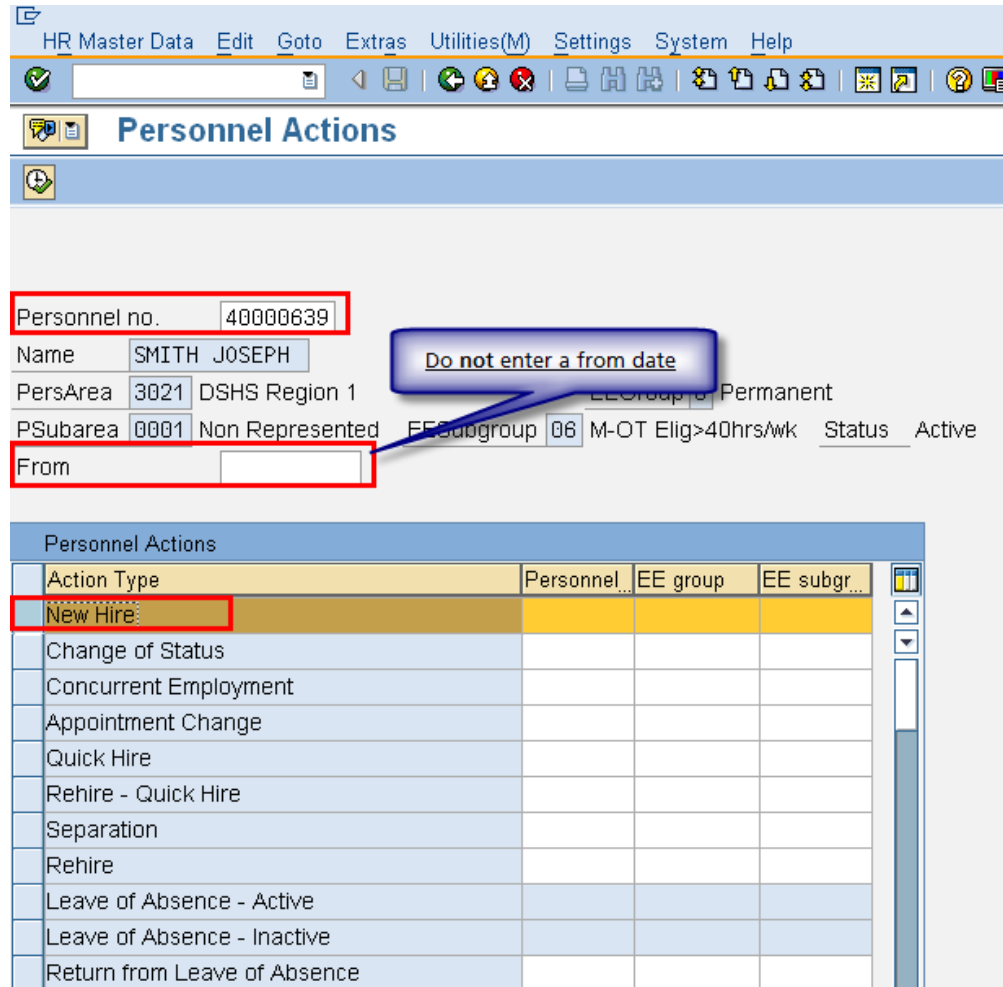
54. Click  (Save) to save data.



For the **Personnel Administration Processor**, this will mark the end of the New Hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Payroll Processor** who will continue the action.

55. Start the transaction using the above menu path or transaction code **PA40**. Enter the

employee's Personnel Number into the **Personnel Number Field** and press  (Enter) to validate data.



HR Master Data Edit Goto Extras Utilities(M) Settings System Help

**Personnel Actions**

Personnel no. 40000639

Name SMITH JOSEPH

PersArea 3021 DSHS Region 1

PSubarea 0001 Non Represented

EE group Permanent

EE subgroup 06 M-OT Elig>40hrs/wk

Status Active

From


**Do not enter a from date**

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			



**Payroll Processor** –Do not put a “From” date in the field prior to executing the transaction.

56.

Click  (Execute) to begin the transaction.

Infotype Edit Goto Extras System Help

**Change Actions (0000)**

Execute info group Change info group

Pers.No. 40000639  
 Name SMITH JOSEPH  
 PersArea 3021 DSHS Region 1 EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 06/01/2012 to 12/31/9999 Chng 12/03/2012 KELLYW

**Personnel action**

Action Type U0 New Hire  
 Reason for Action 02 Probationary

**Status**

Employment 3 Active

**Organizational assignment**

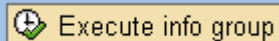
Position 71004928 OFF ASST 3  
 Personnel area 3021 DSHS Region 1  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action
06/01/2012	U0	New Hire	02	Probationary



57.

Click



Infotype Edit Goto Extras System Help

**Change Actions (0000)**

 Execute info group  Change info group

Pers.No. 40000639  
 Name SMITH JOSEPH  
 PersArea 3021 DSHS Region 1 EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 06/01/2012 to 12/31/9999 Chng 12/03/2012 KELLYW

**Personnel action**  
 Action Type U0 New Hire  
 Reason for Action 02 Probationary


**Status**  
 Employment 3 Active



**Organizational assignment**  
 Position 71004928 OFF ASST 3  
 Personnel area 3021 DSHS Region 1  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk

**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action
06/01/2012	U0	New Hire	02	Probationary




**Execute info group**

 Warning: Personnel action infotype not saved with 'execute info group' function!

 Continue  Back



This infotype was already saved and it is okay to continue.

58. Click  (Next Record) until you reach Subtypes for infotype Education, click  (Close) to by-pass this infotype.
59. Continue to click  (Next Record) until you reach Create Bank Details (0009).

Infotype Edit Goto Extras System Help

**Create Bank Details (0009)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Bank details**

Bank details type 0 Main bank

Payee SMITH JOSEPH

Postal Code/City 98501 Oly

Bank Country US USA

Bank Key

Bank Account Bank control key

Payment method C Warrants

Purpose

Payment currency USD United States Dollar



If the employee has not turned in the direct deposit form, or would like to have receive a paper check, move to step 62. If the employee has completed the direct deposit form identifying where they would like their pay check deposited, complete the following:

60. In the Bank Key field, click (Matchcode) to open the Find Bank window.

**Find bank**

Bank Country US

Bank Key

Bank name

City

Bank number



SWIFT code

Bank Branch



House no/street

Restrict Number 500

- |      |   |
|------|---|
| 60.1 | To search for a bank by name: in the Find bank window, in the Bank name field, type a portion of the bank name, followed by an asterisk (*) – for example, Washington*. |
|------|---|

	To search by city, in the Find bank window, in the City field, type an asterisk (*), a portion of the city name, followed by another asterisk (*) – for example, *Olympia*.
60.2	Click  (Continue) to accept and display a list of banks matching the criteria.
60.3	Click the appropriate bank.
60.4	Click  (Copy) to accept.

61. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Bank Account Number	O	<p>The employee's bank account number.</p> <p> Leave blank for a Warrants payment method.</p> <p><b>Example:</b> 325497879</p>
Bank control key	O	<p>The type of bank account - for example, savings or checking.</p> <p> Enter 01 for Checking or 02 for Savings. Do not leave this field blank</p> <p><b>Example:</b> 02</p>
Payment method	R	<p>The manner in which an employee is compensated, either by warrant or direct deposit.</p> <p><b>Example:</b> C = Warrant; D = Bank Transfer (ACH)</p>

Infotype Edit Goto Extras System Help

**Create Bank Details (0009)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Bank details**

Bank details type 0 Main bank

Payee SMITH JOSEPH

Postal Code/City 98501 Oly

Bank Country US USA


Bank Key 325181028 WASHINGTON STATE EMPLOYEES CU

Bank Account 325597879 Bank control key 02

Payment method D Bank transfer (ACH)

Purpose

Payment currency USD United States Dollar

62. Click  (Enter) to validate the information



You must save the Bank Details infotype to accept the default of warrant. If you do not save this infotype, the employee will **red line** on payroll reports and will not process through payroll until the *Bank Details* infotype is created and save.

63. Click  (Save) to save.



Infotype Edit Goto Extras System Help

**Create Recurring Payments/Deductions (0014)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Recurring Payments/Deductions**

Wage Type ☒

Amount  USD

Number/unit

Assignment Number

Reason for Change

**Payment dates**

Payment model

64. If the employee has Recurring Deductions, complete the following fields:



If no information has been provided for recurring payments or deductions,



skip this infotype by clicking (Next record)

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Wage type	R	Type of payment or deduction which stores amounts or time units that are used to calculate pay and deductions. It separates amounts and time units for various business processes.  Click  (Matchcode) to open the selection list. <b>Example:</b> 1156- Clothing Allow
Amount	R	The amount of the payment/deduction.  <b>Example:</b> 20
Payment model	R	The payment schedule for the payment/deduction – the pay

		period and the amount. <b>Example:</b> WA04 Every Pay Period – Full Amount
--	--	---

Infotype Edit Goto Extras System Help

### Create Recurring Payments/Deductions (0014)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Recurring Payments/Deductions**

Wage Type 1156 Clothing Allow

Amount 200.00 USD Semi-monthly

Number/unit

Assignment Number



Reason for Change

**Payment dates**

Payment model WA04 Every Pay Period - Full Amt



During the **New Hire Action**, only **one** *Recurring Payment/Deduction* can be created. If the employee has **multiple** Recurring Payments/Deductions, **after** you have completed the **New Hire** action, go to **PA30** to create additional Recurring Payment/Deductions. Refer to the user procedure [Recurring Payment/Deduction](#)

65. Click  (Enter) to validate the information.
66. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Create Unemployment State (0209)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active



Start 06/01/2012 to 12/31/9999

Unemployment data

Tax authority ☒

Worksite ☒

67. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Tax Authority	R	The state of employment  <b>Example:</b> WA
Worksite	R	The county of employment   Click on the  (Matchcode) to display a list of all counties within the State of Washington.  <b>Example:</b> 34- Thurston County

Infotype Edit Goto Extras System Help

Create Unemployment State (0209)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent



PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

Unemployment data

Tax authority WA Washington

Worksite 34 Thurston County

68. Click  (Enter) to validate the information.
69. Click  (Save) to save.

Infotype Edit Goto Extras System Help

**Create Withholding Info W4/W5 US (0210)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Status**

Tax authority FED Federal Tax level A Federal

Filing Status ☒

**Exemptions**

Allowances

Tax Exempt Ind. Not exempt ☐ IRS mandates

**Withholding adjustments**

Add withholding  USD ☐ Non-resident tax calculation

Default formula 01 PCT MTHD-RES. U Alternative formula

**Additional Information**


☐ Check here if the last name differs from that shown on the Social Security card


**Overrides (from Infotype 0234)**

From date	End Date	Supplemental method	Tax override	Empl. Override Group

70. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Filing Status	R	The status elected by the employee for Federal tax withholding. <b>Example:</b> 02 – Married
Allowance	R	The number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck.

		<b>Example: 02</b>
Add. Withholding	O	<p>An amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status.</p> <p><b>Example: 100.00</b></p>
Tax exempt Indicator	C	<p>The indicator which determines if the employee is exempt from taxation.</p> <p> Using <b>Tax Exemption indicator Y</b> will make the wages exempt from taxation <b>and not</b> reportable to the IRS.</p> <p>Using <b>Tax Exemption indicator R</b> will make the wages exempt from taxation and earnings <b>are</b> reported to the IRS.</p> <p><b>Example: Y – Exempt, not reportable</b></p>

71. Click  (Enter) to validate the information.

Infotype Edit Goto Extras System Help

Create Withholding Info W4/W5 US (0210)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/Awk Status Active

Start 06/01/2012 to 12/31/9999

Status

Tax authority FED Federal Tax level A Federal

Filing Status 02 Married

Exemptions

Allowances 2

Tax Exempt Ind. Not exempt ☐ IRS mandates

Withholding adjustments

Add withholding USD ☐ Non-resident tax calculation

Default formula 01 PCT MTHD-RES. U Alternative formula

Additional Information

☐ Check here if the last name differs from that shown on the Social Security card

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Empl. Override Group

72. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Create Add. Withh. Info. US (0234)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Overrides**

Tax authority FED Federal Tax level A Federal

Supplemental method

Override amount




Override percentage ☐ No Tax

Empl.override group


**Common Paymaster**

☐ Common Paymaster




























73. Complete the following:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Empl. override group	R	<p>This is the Worker's Compensation code that an employee holds for a particular job.</p> <p> Click on the  (Matchcode) to display all Empl.override group.</p> <p> The employee override group number must match your agency <b>Business Area</b>.</p> <p>For this example, the employee has been hired into the <b>Personnel Area 3021- DSHS Region 1</b>, which belongs to <b>Business Area 3000</b>.</p> <p>If the numbers do not match, it could cause incorrect amounts of Medical Aid being withheld from your employee.</p> <p><b>Example:</b> 0068 3000-4902-00 Admin &amp; Clerical</p>






74. Click  (Enter) to validate the information.

Infotype Edit Goto Extras System Help

### Create Add. Withh. Info. US (0234)

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Overrides**

Tax authority FED Federal Tax level A Federal

Supplemental method

Override amount

Override percentage ☐ No Tax


Empl.override group 0068 3000-4902-00 Admin & clerical

**Common Paymaster**

☐ Common Paymaster

75. Click  (Save) to save.



For the **Payroll Processor**, this will mark the end of the hire action. After saving, click  to exit the action and transfer the New Hire Information Packet to the **Benefits Processor** who will complete the action.

76. Start the transaction using the above menu path or transaction code **PA40**.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

**Personnel Actions**

Personnel no. 40000639

Name SMITH JOSEPH

PersArea 3021 DSHS Region 1

PSubarea 0001 Non Represented

EE subgroup 06 M-OT Elig>40hrs/wk

Status Active

From

**Do not enter a from date**


Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			




**Benefits Processor** –Do not put a “From” date in the field prior to executing the transaction.













77. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel no.	R	The employee’s unique identifying number. <b>Example:</b> 40000639



78. Click  (Enter) to validate the information.

79. Click  (Execute) to start the transaction.

Infotype Edit Goto Extras System Help

### Change Actions (0000)

 Execute info group  Change info group

Pers.No. 40000639  
 Name SMITH JOSEPH  
 PersArea 3021 DSHS Region 1 EEGroup 0 Permanent  
 PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active  
 Start 06/01/2012 to 12/31/9999 Chng 12/03/2012 KELLYW


**Personnel action**  
 Action Type U0 New Hire  
 Reason for Action 02 Probationary

**Status**  
 Employment 3 Active


**Organizational assignment**  
 Position 71004928 OFF ASST 3  
 Personnel area 3021 DSHS Region 1  
 Employee group 0 Permanent  
 Employee subgroup 06 M-OT Elig>40hrs/wk



**Additional actions**

Start Date	Act.	Action Type	ActR	Reason for action
06/01/2012	U0	New Hire	02	Probationary

80. Click  Execute info group .
81. An Execute info group window will appear.

Execute info group

 Warning: Personnel action infotype not saved with 'execute info group' function!

 Continue  Back



This infotype was already saved and it is okay to continue.

82. Click (Next Record) until you reach Subtypes for infotype Education, click (Close) to by-pass this infotype.

83. Continue to click (Next Record) until you reach Create General Benefits Information (0171).

Infotype Edit Goto Extras System Help

**Create General Benefits Information (0171)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active


Start 06/01/2012 to 12/31/9999


**General Benefits Information**

Benefit area	US	USA
1st Program Grouping	ELIG	Eligible for Rtmnt
2nd Program Grouping	01	State Employees

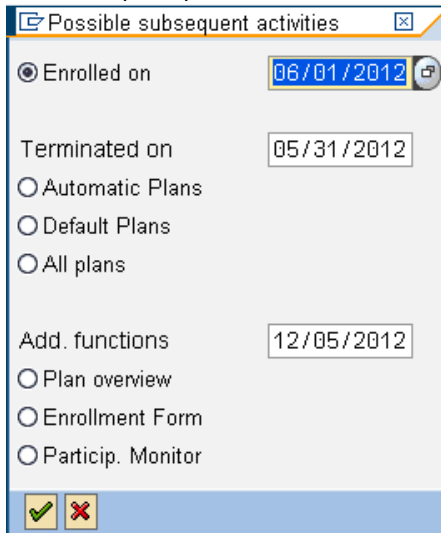
84. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
1 <sup>st</sup> Program Grouping	R	<p>This is used to determine an employee's retirement plan eligibility.</p> <p> The <b>1<sup>st</sup> Program Grouping</b> defaults in as eligible. To verify that the position is eligible use transaction code <b>PO13D</b>, click the gray box to the left of <i>Acct Assignment Features</i> infotype. If there is an X in the box next to Retirement Eligible field, then the position is retirement eligible. If the box is blank, the position is not retirement eligible.</p> <p><b>Example:</b> ELIG – Eligible for Rtmnt</p>
2 <sup>nd</sup> Program Grouping	R	This defines the employee's job type and employer.

		 The value in the <b>2<sup>nd</sup> Program Grouping</b> field defaults from the personnel area. You will have to change the <b>2<sup>nd</sup> Program Grouping</b> field if: An employee chooses a different plan. The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time. An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position. For a list of valid type codes for each retirement system, see <a href="#">The Employer Handbook - Type Codes</a> <b>Example:</b> 01
--	--	---

85. Click  (Enter) to validate the information.

86. Click  (Save) to save.



Possible subsequent activities

☒ Enrolled on 06/01/2012

Terminated on 05/31/2012

☐ Automatic Plans

☐ Default Plans

☐ All plans


Add. functions 12/05/2012

☐ Plan overview

☐ Enrollment Form

☐ Particip. Monitor

☒ ☐

87. Click  (Copy) to accept.

Enrollment Edit Goto System Help

**Enrollment**

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name...

40000639 SMITH JOSEPH

Enroll


Name SMITH JOSEPH on 06/01/2012 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Offer

88. Click  Get offer. By using the **PA40** transaction code, HRMS will identify all plans that the employee is eligible to participate in.

Enrollment Edit Goto System Help

**Enrollment**

Direct selection Selection set

Personnel no.

ID number

Select

Pers.No. Name...

40000639 SMITH JOSEPH

Enroll

Name SMITH JOSEPH on 06/01/2012 Overview

Offer selection

Get offer Print form General Notice Error list

Possible offers	Enrollment period
Retirement Enrollmnt	01/01/1800 - 12/31/9999

Retirement Enrollmnt

Plan	Status	Validity period	Activity
401(a)			
PERS 2		06/01/2012 - 12/31/9999	
PERS 3 - Option 0		06/01/2012 - 12/31/9999	
PERS 3 - Rate A - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate A - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate B - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate B - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate C - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate C - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate D - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate D - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate E - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate E - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate F - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate F - WSIB		06/01/2012 - 12/31/9999	

89. Click the appropriate Savings Plan. For our example, we will be re-enrolling into the PERS2 plan.



For a new PERS2 employee, upon completion of the enrollment process, immediately update the Plan Choice code on the *Savings Plans (0169)* infotype to place the employee on the 70-day/90-day default report. See the OLQR User procedure [Retirement Plan Choice Coding during 90 day period \(New Hire\)](#)

**Maintain Savings Plan**

Pers.No. 40000639 SMITH JOSEPH  
 Plan PERS 2  
 Start 06/01/2012 - 12/31/9999

☐ Stop participation in period

**Contribution regular**



**Pre-tax contribution Semi-monthly**





Amount 0.00 USD ☐ Pre-Tax Rollove  
**Percentage**   
 Units 0 X 0.00 USD



**Post-tax contribution Semi-monthly**

Amount 0.00 USD ☐ Start Pst-Tax I  
 Percentage 0.00  
 Units 0 X 0.00 USD

90. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Percentage	R	<p>This is a field used to store a percentage amount for the retirement deduction.</p> <p> <b>Do not leave the percentage field blank or HRMS will not take any deductions for retirement.</b></p> <p> If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an Error message in the status bar telling you what the correct contribution</p>

	<p>percentage is for the selected plan.</p> <p> Error</p> <p> Percentage pre-tax contribution for plan P2 must lie between 4.64 and 4.64 %</p> <p> </p> <p><b>Example:</b> 4.64</p>
--	---

 Maintain Savings Plan 

Pers.No. 40000639 SMITH JOSEPH

Plan PERS 2

Start 06/01/2012 - 12/31/9999

☐ Stop participation in period

**Contribution regular**

**Pre-tax contribution Semi-monthly**

Amount 0.00 USD ☐ Pre-Tax Rollove

Percentage 4.64



Units 0 X 0.00 USD

**Post-tax contribution Semi-monthly**


Amount 0.00 USD ☐ Start Pst-Tax I

Percentage 0.00

Units 0 X 0.00 USD





 Accept 

91.

Click  Accept .



Retirement Enrollment

 Enroll
  Costs
  Undo selection
  Error List

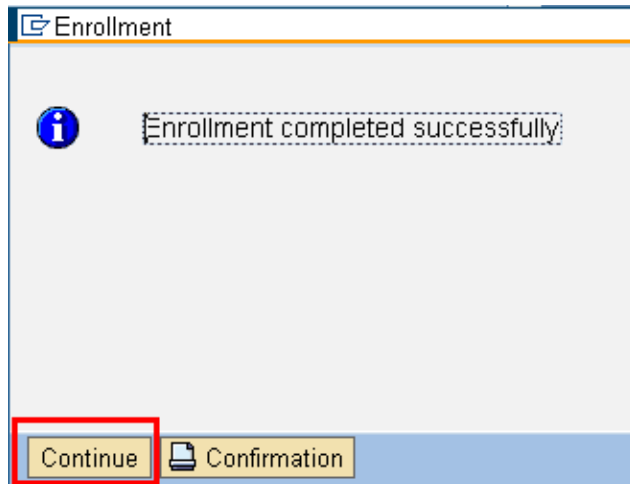
Plan	Status	Validity period	Activity
▼ 401(a)			
PERS 2		06/01/2012 - 12/31/9999	✓
PERS 3 - Option 0		06/01/2012 - 12/31/9999	
PERS 3 - Rate A - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate A - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate B - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate B - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate C - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate C - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate D - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate D - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate E - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate E - WSIB		06/01/2012 - 12/31/9999	
PERS 3 - Rate F - Self		06/01/2012 - 12/31/9999	
PERS 3 - Rate F - WSIB		06/01/2012 - 12/31/9999	


92.

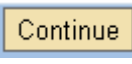
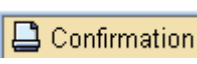
[illegible]

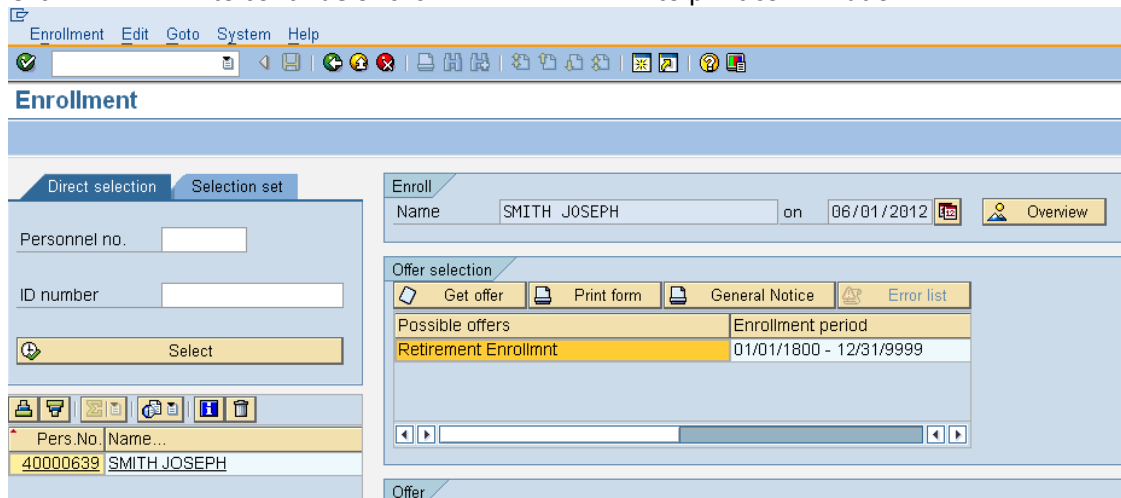
93.


Click  Enroll

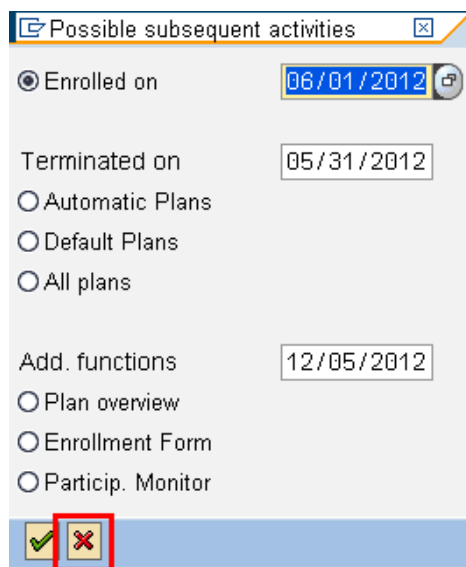


 The *Confirmation* button is not configured for use by the State of Washington at this time. However, agencies may use this as a confirmation of enrollment.

94. Click  to continue or click  to print confirmation.



95. You will be taken back to the Enrollment screen. Click  to return to the previous screen. The Possible subsequent activities window will appear.



Possible subsequent activities

☒ Enrolled on 06/01/2012

Terminated on 05/31/2012

☐ Automatic Plans

☐ Default Plans

☐ All plans

Add. functions 12/05/2012

☐ Plan overview

☐ Enrollment Form

☐ Particip. Monitor

☒ ☐

96. Click  to cancel.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Personnel no. 40000639

Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

From

Action Type	Personnel...	EE group	EE subgr...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Leave of Absence - Active			
Leave of Absence - Inactive			
Return from Leave of Absence			

97. You will be taken back to the Personnel Actions (PA40) screen. You have hired a new employee into HRMS.
98. To enter the employee's e-mail address into HRMS
99. Enter /nPA30 in the command field

HR master data Edit Goto Extras Utilities(M) Settings System Help

**Maintain HR Master Data**

Personnel no. 40000639

Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Personal Data

Infotype text s...

Actions: Organizational Assignment Personal Data Addresses Planned Working Time Basic Pay Contract Elements Date Specifications Family/Related Person

Period: Period From To Today Curr.week All Current month From curr.date Last week To Current Date Last month Current Period Current Year Choose

Direct selection Infotype STy

100. Select the **Addtl. Personal Data** tab.
101. Click the box to the left of **Communication** to select and click **Create** (Create) to create the record.

HR master data Edit Goto Extras Utilities(M) Settings System Help

**Maintain HR Master Data**

Personnel no. 40000639

Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Basic Personal Data Payroll Benefits Time Recording **Addtl. Personal Data**

Infotype text s...

Monitoring of Tasks ✓

Family Member/Dependents

Education ✓

Other/Previous Employers

Objects on Loan

Additional Personal Data ✓

Military Service ✓

Residence Status

**Communication:**

Period

From To

Today Curr.week

All Current month

From curr.date Last week

To Current Date Last month

Current Period Current Year

Choose

Direct selection

Infotype STy

102. You will receive the *Subtype for infotype Communications Pop-up*

Subtypes for infotype "Communication" (1) 15 Entries found

Restrictions

STyp	Name
0001	System user name (SY-UNAME)
0002	SAP2
0003	Netpass
0004	TSO1
0005	Fax
0006	Voice mail
0010	E-mail
0011	Credit card number(s)
0020	First telephone number at work
0030	Private E-Mail Address
CELL	Cell Phone
FR01	Health Insurance Organization
MAIL	E-Mail
MPHN	Car phone/other mobile phone
PAGR	Pager

103. Double click **0010 E-mail** to select

**Create Communication (0105)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 06/01/2012 to 12/31/9999

**Communication**

Type 0010 E-mail

ID/number ☒

104. Enter employee's email into ID/Number Field

**Create Communication (0105)**

Personnel No. 40000639 Name SMITH JOSEPH

PersArea 3021 DSHS Region 1 EGroup 0 Permanent



PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active



Start 06/01/2012 to 12/31/9999

**Communication**

Type 0010 E-mail

ID/number JOSEPH.SMITH@DSHSREG.WA.GOV

105. Click  (Enter) to validate data.
106. Click  (Save) to save.
107. You have completed the transaction.

Results
You have hired an employee.
Comments
<div data-bbox="186 451 251 514"></div> <p data-bbox="284 483 1412 556">If the employee is entitled to a personal holiday and has not used it this year, create a Personal Holiday quota type.</p> <div data-bbox="186 588 251 651"></div> <p data-bbox="284 619 1396 693">If the employee chooses to stay in Plan 2 see the OLQR Procedure Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 2</p> <ul data-bbox="235 735 1412 955" style="list-style-type: none"> <li>• If the employee chose Plan 3, see the OLQR Procedure <a href="#">Retirement Plan Choice Code Chosen Plan or Defaulted to Plan 3</a></li> <li>• One of these procedures must be completed when the employee submits their completed DRS member information form designating their choice during the 90-day choice period.</li> <li>• The employee that is enrolled in Plan 2 will default to P3, Rate A – WSIB invest manager if no plan is chosen within the 90-day period.</li> </ul>